

# In-memory giving and gifts in Wills

What connects them and what can we  
do about it?

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# | What two things...



I What two things...

**Can be polls apart ...**



| What two things...



**Can be pulled apart ...**  
**Can inspire each other ...**

| What two things...

**Can be pulled apart ...**

**Can inspire each other ...**

**And can be one and the same?**

| What two things...

# In-memory giving and gifts in Wills



# Three questions to explore – one practical take-away

1

What do we know about the connections between legacy and in-memory giving?

2

What factors could help explain these links?

3

What's the big challenge with in-memory legacies?



**10 things you can try now to make the most of these connections.**


Who am I?

Senior In-Memory Consultant

Legacy Futures







What do we know about  
the connections between  
in-memory and legacy giving?



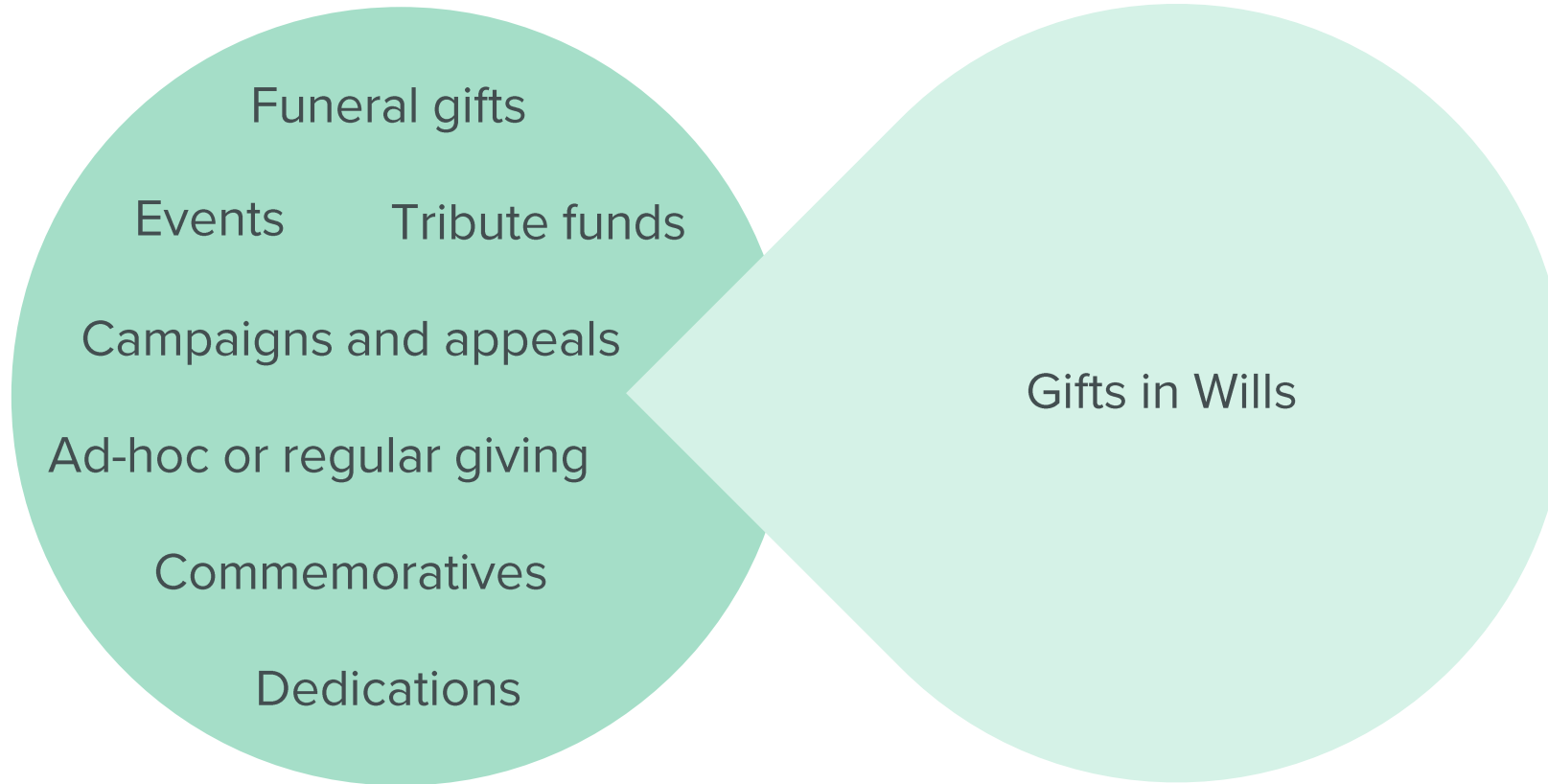
# I What exactly do we mean by both terms?

## In-memory giving

Donating or fundraising to remember someone special

## Legacy giving

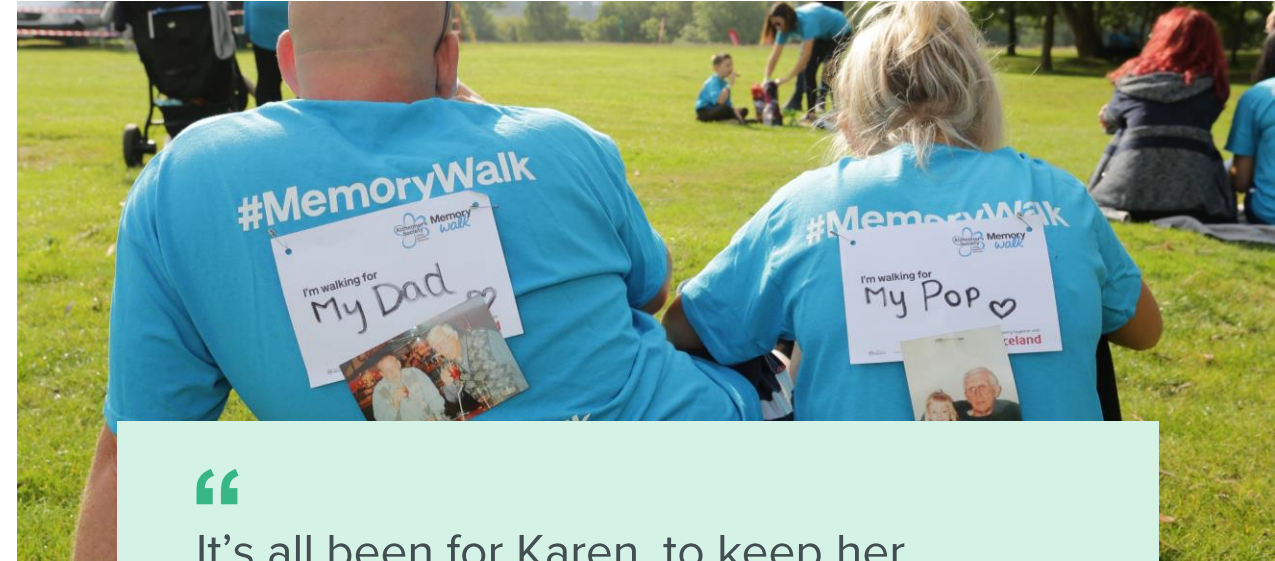
Gifts in Wills



# | How are they (usually) different?

## In-memory giving

- An act 'for' somebody else
- Focused on one special person
- More about looking back than forward?
- Choice of charity made in the moment
- ... often by somebody else
- No prior engagement required with the charity
- Anything goes with channel or product
- Gifts can be very low value
- Often a 'one and done' act



“

It's all been for Karen, to keep her memory alive. Every mountain I climb, she is always at the forefront of my mind.

[In-memory supporter, Legacy Futures research](#)

# I How are they (usually) different?

## Legacy giving

- An act on my own behalf....
- Driven by symbolic immortality – me, my values, the influence I can have
- Focused on a wider cause, community, or long-term challenge
- Glancing back, but with the lens trained firmly on the future
- Prescriptive mechanism (never much fun)
- Strong engagement and tenure with the charity
- The biggest gift I'll ever make?
- But my pledge unlikely to be my final act



“

When I die, I can still do some good. You can still continue to make a difference to somebody, it's not over. You can be immortal! It's strange, but it's probably the last good thing you can ever do.

[Legacy pledger, Legacy Futures supporter research](#)

# | What do in-mem and legacy decisions (often) have in common?

Both can be highly loaded, involving deep consideration of which values matter the most...

... to the person who was special to me, embodied in the way that they lived, loved (or died).

or

... to me, for what I stand for – for the kind of world I want to imagine.

“

It was something I was able to talk to her about, right up to the end, looking out of the window at the birds and talking about the animals. It was something deep that triggered her memories. So when I arranged the funeral and they said, ‘would you like to give it to Dementia?’ I said ‘no, she would have wanted it to go to the animals.’

**In-memory supporter, Legacy Futures research**

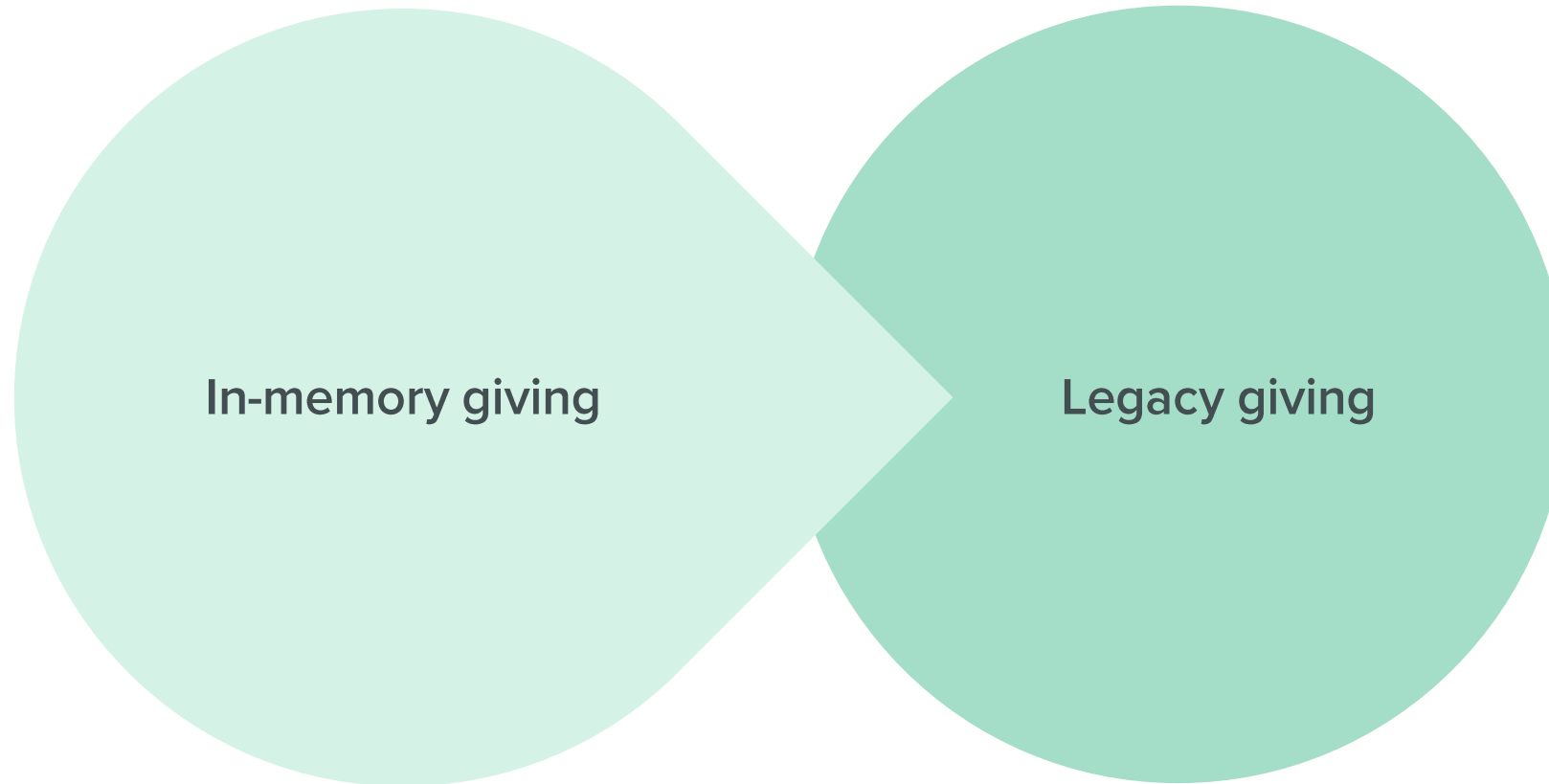
“

When the day comes when I finally pop my clogs, I know that my £10,000 or whatever is going to be used wisely, if you can see ongoing projects that are really making a difference to people’s lives.

**Joyce, legacy pledger, Claire Routley’s PhD!**

# I What's the most important connection?

**One can inspire the other**



# | What's the most important connection?

They can converge, when an in-memory legacy is created

“

It makes sense, and the gift has almost become a part of who we are now. It's there, it's almost a comfort. There's that last thing, that even when we're not here to remember him, something else will be.

[In-memory pledger, Legacy Futures research](#)



# In-memory legacies are **always** about the loved one

So the good they achieve reflects directly back on that person



“

It sounds selfish to say Patrick deserves his own name up there, but it would make a difference because you'd feel he'd had some purpose to his life, and that he was personally overseeing some work done in the future. It would make a difference in the future. It would make a difference.


[In-memory pledger, Legacy Futures research](#)



# Remembering a loved one is an important motivation for gifts in Wills

Leave a gift in your will | Michael's Story

YouTube · The Salvation Army UK & Ireland Territory · 21 Jan 2022

YouTube 



Source: Legacy Futures research, 2020

**40%**  
of legacy donors already had at least one in-memory motivated gift in their Will

# I In-memory donors are unusually open to legacy conversations

“

I think I probably would leave a gift to [Charity X]. It would be because of my Mum.

“

Mum left a legacy, because Dad did. I think Mum's legacy was really a tribute to my Dad.

“

Have you made a Will?' would feel appropriate from [Charity X]. I have made a Will, and they are in there. I'm happy to tell them that.

“

I'd be happy to consider... it's a good idea... there's continuity there.

“

We all have to die at some stage, don't we? And if you feel you can give a bit of support on the way, then that's good.

Source: Legacy Futures research with in-memory supporters of different charities

# | In-memory giving drives legacy propensity



**x3**

In-memory donors were three times more likely to leave a gift in their will than standard regular givers

Source: Legacy Foresight, 2020

# In-memory motivated legacies are worth a lot more



**60%**

Residual gifts worth 60% more  
(£87,200 vs £54,500)

Pecuniary gifts worth twice as much  
(£8,100 vs £4,050)

Source: Legacy Foresight, 2020

# I People have stronger feelings towards legacies when they are ‘in-memory’

“

I’m never likely to take them out of my Will and if anything, I’ll probably increase the gift. I’ll never forget what they did. They will always have a place in our hearts.

In-memory pledger, Legacy Futures research



# Most in-memory pledgers don't think of the charity as 'theirs'



“

Mum left a legacy, because Dad did. I think Mum's legacy was really a tribute to my Dad.

In-memory pledger, Legacy Futures research



What factors could help explain these links?



# I Offering an ‘in-memory legacy’ can increase interest

James (2015) found that offering people the opportunity to leave a bequest in memory of a loved one – in particular an ascendant such as a parent or grandparent – was particularly compelling.

Measured on a 100-point scale, interest in a tribute bequest was 10 points higher than initial interest in leaving a traditional bequest gift to the same organization.





# I Several different factors, working together?

In-memory supporters are already in the 'bereavement zone'?

The experience of losing someone special makes us unusually receptive to big-ticket giving?

In-memory stewardship (especially coming after end of life care) can cause us to fall in love with a charity?



What's the big challenge  
with in-memory legacies?



# I Our perceptions of both the past and the future can change

“

It's your whole life, isn't it? The framework of your life, as it matures.

In-memory pledger, Legacy Futures research





things you can try now to  
make the most of these  
connections



# I Use internal engagement to explain the connections (and differences) to colleagues in other teams



I sometimes think – because we’re the same team, basically trying to deliver messages about both areas of giving – that can get confusing for people. I honestly don’t believe people here understand how they are different... or, they just see in-memory as a side-hustle of legacies.

[Legacy and In-memory Manager, Legacy Futures stakeholder research](#)



# Promote legacies as an in-memory offer in their own right



**MACMILLAN**  
CANCER SUPPORT

Cancer info and support Online Community Donate Fundraise Cost of living More ▾

Donate Your account

**Donate**

Donate How to donate **Donate in memory** Impact of donations Gift in Wills Philanthropy

## Donate In Memory

Choose to honour your loved one's memory by supporting Macmillan is one way to continue their story. Donate online today or see below for more ways you can fundraise, collect or give in memory.

[Donate](#)

**Tribute funds >**  
Add photos and memories, collect donations, and share details of any fundraising you're doing in tribute of someone special.

**Funeral collections >**  
Collect donations at your loved one's funeral. It is a way to remember and celebrate them.

**Fundraise in memory >**  
Take part in an event in memory of a family member or friend. Celebrate their life and raise money to support people living with cancer.

**Gifts in wills >**  
Leaving a gift in your Will in memory of someone is one of the most special ways you can continue their story.



## Leave a gift in your will >

Leaving a gift in your will to Macmillan in memory of someone special is one of the most impactful ways you can continue their story. Find out more or register to write your will today.

# Create inspiration around remembering somebody special as a reason to pledge



## Leave a gift in memory

Our supporters tell us considering all their children in their final wishes, including babies who have died, feels natural and incredibly important. Leaving a gift in your Will to Sands in memory of your much-loved son or daughter, niece, nephew or grandchild makes sure their memory and name live on in all you'll make possible.

Your gift in their memory will be the reason more babies' lives are saved and bereaved families will always have somewhere to turn for as long as they need support.

*"I decided to add a gift for Sands to my Will after the stillbirth of our first grandchild. When I felt bereft and powerless to help my daughter Sands was a lifeline."*

Beryl Martyn

If your gift is in memory of someone precious to you, we'd love to know so we can recognise them in everything you'll make possible and help with any special requests relating to your gift. Please get in touch with us at [legacies@sands.org.uk](mailto:legacies@sands.org.uk).

*"I decided to add a gift for Sands to my Will after the stillbirth of our first grandchild. When I felt bereft and powerless to help my daughter Sands was a lifeline."*

Beryl Martyn

I Dial up legacies as a core component of tribute funds



[Home](#) > [Give to CAFOD](#) > [Leave CAFOD a gift in your Will](#) > Gifts in Wills in memory of a loved one

# Gifts in Wills in memory of a loved one

Did you know that you can choose to leave a donation to CAFOD in your Will in memory of a loved one or **into your Candlelight Fund?**



| ... and as an **exit strategy** for funds that have run their natural course



# I Use heartfelt in-memory stories to bring life and warmth to legacy content



## Mandy's Story

Costa Panayiotou had glaucoma for many years. He started to develop macular degeneration in his 50s and later in life had two vein occlusions that left him with virtually no sight at all.

Costa sadly died in 2017. His daughter, Mandy, decided to leave a gift in her Will to RNIB. She explained: "As Dad's sight deteriorated, he could no longer do the things he loved, which was such a blow to him."

"I've left a gift to RNIB in my Will, in memory of my dad, who lived with sight loss for a number of years, but also so that RNIB can carry on helping as many people as possible in the future. With everything going on in the world at the moment, it's a comfort that RNIB is there to offer help, advice and support for people so that they're not alone."



Mandy with her father, Costa

# I Wherever you can, remind your legacy audience about remembering loved ones



## Your Gift May Inspire Others to Give.

We hope you are willing to be acknowledged in *Save the Chimps* publications with other members of the Carole Noon Legacy Society.

### How would you like to be listed in *Save the Chimps* publications?

Please select only one of the following and provide a name.

- Please list my name as:
- My gift is IN HONOR of:
- My gift is IN MEMORY of:
- I prefer to remain anonymous.

### Please be sure to use the following language in your plans:

I bequeath \_\_\_\_\_ (dollar amount or % of estate) to Save the Chimps, Inc., a nonprofit organization, with its principal business address at PO Box 12220 Fort Pierce, FL 34979. EIN/Tax ID: 65-0789748

# I Enable collective giving

An example



“

Dad, I think we should make a large gift to that children’s hospital.

Rob’s proposal was a staggering amount for us — one that would require a series of current and future gifts. It was one of those ideas that kind of makes you gasp and go weak in the knees. After the initial shock, the thought came to mind, *Who is WE?* I knew neither Rob nor Barrett had that kind of money. Nonetheless, “we” accepted the challenge and began to move forward with a gift that was unprecedented for our family.



# Consider the option of blended giving for your charity

For example...



## Blended Gifts Leave Lasting Impact

LSU alumnae Lillian Hoover and Jackie Wintle (Human Sciences & Education, '56 and '62, respectively) are making the most of their support of the LSU School of Library & Information Sciences through planned gifts. By "blending" charitable gift types, in their case immediate contributions along with planned gifts to provide for LSU's future, both women are enjoying the impacts of their contributions today while committing to future gifts that will extend their dedication to library studies.

Hoover's SLIS graduate scholarship is in memory of her late husband, Jimmie (Human Sciences & Education, '58), director of government documents for LSU Libraries from 1967-84. She has enjoyed meeting the scholarship recipients for years, and the fund will increase through her estate.

"He was such a kind person. He really loved working with the students. And they loved him," Hoover shared.

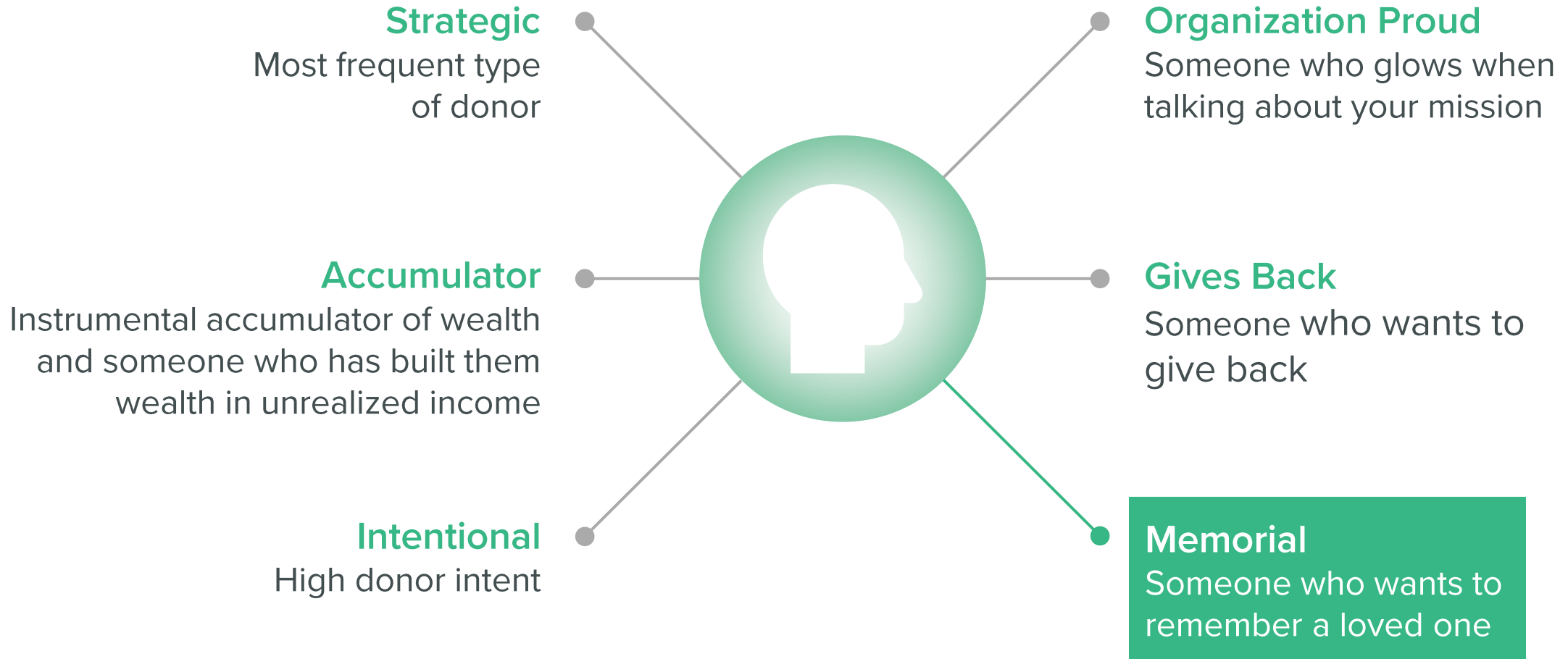
Hoover left Baton Rouge when she was 20 years old to join the U.S. Navy. She oversaw the women's barracks at Naval Air Technical Training Center in Norman, Okla. She returned home after the untimely death of her first husband, Erwin Klettke, an ExxonMobil employee, and met Jimmie soon after.

As a surviving spouse, Hoover's gift was matched three-to-one by the company. She considers it a tribute to both of her "wonderful husbands."



Lillian Hoover

# I What type of donor makes a blended gift?



Source: Thompson and associates

# | Celebrate your charity's own legacy heroes



“

We never had the chance to thank Celia in person, but we honour her memory by carrying out the work she cared for. I'm proud to be part of Celia's legacy.

**Barbara, Help for Heroes office volunteer, remembering Legacy hero Celia Williams**





# 10 things you could try now to make the most of these connections

1. Use internal engagement to explain the connections (and differences) to colleagues in other teams
2. Promote legacies as an in-memory offer in their own right
3. Create inspiration around remembering somebody special as a reason to pledge
4. Dial up legacies as a core component of tribute funds
5. ... and as an 'exit strategy' for funds that have run their natural course
6. Use heartfelt in-memory stories to bring life and warmth to legacy content
7. Remind your legacy audience about remembering loved ones wherever possible
8. Enable collective giving
9. Consider the option of **blended giving** for your charity
10. Celebrate your charity's own legacy heroes



# | Break-out session challenge

Which of these ideas struck you the most – and how will you apply it?



# Back in the room!

Thoughts and questions?



# | The Legacy Futures family

Legacy Futures is the UK's leading charity consultancy that specialises in gifts in wills and in-memory giving. We are a trusted partner to 330 charities worldwide, supporting them to harness the transformative power of legacy giving.

Legacy Futures brings together three expert teams:

## **Legacy Foresight**

Legacy Foresight is best known for its forecasting, benchmarking and research, often working with charity consortia to gain greater insight into Legacy and In-Memory markets.

## **Legacy Voice**

Legacy Voice helps charities improve their legacy marketing strategies and communications, working with charities large and small, UK and International, turning insight into strategy and action.

## **Legacy Link**

Legacy Link is the UK's largest team of estate administration consultants, helping to maximise the gifts left to a charity, and adding value at every step of the way.



# Thank you!

Please keep in touch

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